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ABSTRACT

This manual gives general information on how to plan for each aspect of the Oregon Educational Media Association's (OEMA) fall conference. Part I provides lists of conference objectives and policies, as well as the responsibilities of the OEMA board to the conference committee and of the conference chairperson to the OEMA board. The role of the conference chairperson, selection of the conference executive committee, and pitfalls of conference administration are outlined in Part II. The third section lists the responsibilities of the program committee and gives 13 factors to be considered in planning for exhibits. The final part provides guidelines for the various support services to the conference including the conference treasurer, services and equipment, registration, publicity, site, local help, hospitality, and conference evaluation. (CHC)

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THE OEMA FALL CONFERENCE

PLANNERS HANDBOOK

1981 EDITION

Based upon the experiences of over five years of
planning educational media conferences in the cities
and towns of Oregon. Compiled and edited from the
work of such planners by Jim Heath, Maggie Rogers,
and Jim Maxwell.

Portland, Oregon: Oregon Educational Media Association

1981

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INTRODUCTION

THE FALL CONFERENCE PLANNING SYSTEM

This manual is one part of a three-part system which has been designed to help you hold a successful fall conference. The three-part system includes:

1. This OEMA Fall Conference Planners' handbook which gives general information on how to plan for each aspect of the conference. This should be updated annually by the OEMA board.
2. The Conference notebooks, referred to in the text as "notebooks" or "appendices". There is one notebook for each committee. These are available from the former conference chairperson who shall have gathered them at a final evaluation meeting after the conference.
3. A Fall Conference Matrix. This booklet contains a matrix of common Fall Conference activities, such as "exhibits", with data as to who, what, when and how many were ordered, sold, set up, used, etc., for the last five Fall conferences. At this writing it is uncertain who will make these available. To do the best job, you must have all three parts of the system.

ABOUT THE AUTHORS

This handbook has been written by several people. After every conference, it is intended that each section should be revised by the appropriate chairperson.

This manual will necessarily have conflicting points of view. You, as the decision maker will have to weight the arguments.

ABOUT THE COMMITTEE

The manual was the brainchild of Maggie Thorne, who realized the need and created the first manual when she chaired both the 1976 and the 1977 conferences in Portland.

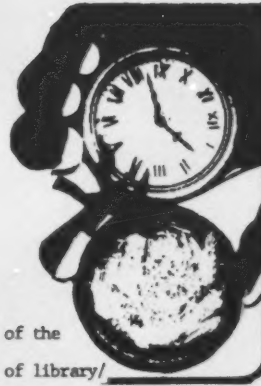
In 1979, a committee was formed with Jim Heath as chairperson, Maggie and Jim Maxwell (1979 chairperson) to create a manual. The committee created the conference planning system.

This edition was typed by OEMA member Cathy Hott and aide DeeDee Groleau.

The printing was done by Jerry Deata's staff at Deschutes ESD.

I CONFERENCE OBJECTIVES AND POLICIES

by Maggie Thorne
1976 and 1977
Portland



A. CONFERENCE OBJECTIVES

1. To Provide for the Continuing Education of Members

- a. The Fall Conference is the major continuing education activity of the organization and should be planned to meet as broad a spectrum of library/media/curriculum needs as can be identified for the following groups:
 - (1) building level media specialists
 - (2) district level media specialists
 - (3) regional level media specialists
 - (4) media specialists in higher education institutions
 - (5) non-school media personnel, such as in public libraries and other institutions
 - (6) television specialists
 - (7) educational graphic artists
 - (8) educational electronic technicians
 - (9) media administrators
 - (10) trainers of media specialists
 - (11)
 - (12)
 - (13)
- b. University and continuing education units or credits should be offered for attendance/involvement in conference sessions whenever possible, by the Continuing Education Committee of OEMA in cooperation with the Conference Planning Group.
- c.

2. To Provide for Information Delivery to Educational Institutions

- a. The information needs of the membership and the educational institutions who employ them should be met through sessions with presenters from the State Department of Education and other agencies who monitor or regulate, or service agencies whose work is available to school media programs.
- b.

3. To Provide for Annual Membership Renewal

- a. The Membership Committee should use Conference publicity and time to renew as many as possible of the memberships of the organization.
- b.
- c.

4. To Provide for Annual Meetings of Affiliate or National Organizations

- a. Groups who should be contacted as soon as planning for schedule times commences:

- (1) Grafica, OEETA and other interest groups
- (2) AECT, AASL, ARMO and other regional or national groups
- (3) affiliates, such as Multnomah/Clackamas, Lane and Coos county media specialists
- (4) committees and task forces of OEMA
- (5) organizations whose work affects OEMA members (i.e. the Region 9 AECT Leadership Workshop Planning Committee
- (6) future OEMA conference planning groups
- (7)

b.

5. To Provide for the Annual Members' Business Meeting

- a. The Bylaws, Article VIII, Section 2, state that an Annual Business Meeting of the Association must be held during the first state-wide conference of the year.
- b. Because Bylaws changes and certain other business activities call for involvement of a large portion of the membership, it is important to plan the publicity for the Conference so that members can know the time, place and agenda for the meeting.
- c. This meeting has taken many forms: luncheon, then meeting; general assembly to begin the Conference; box lunch with con-current meeting in large meeting room.
- d.
- e.

6. To Provide for Professional Exchange

- a. The Conference scheduling should allow time for members to engage in "professional exchanges" - whether in social events, "idea rooms", reports from national groups, or simply time to spend in conversation.
- b.
- c.

7. To Provide Professional Recognition: Retirees

- a. The Conference has become the appropriate event at which to specially recognize the contributions to the profession of those who are retiring from it, either through testimonial, awards, gifts or other means, so that younger members may meet and show appreciation.
- b. Not all retirees may want to participate; all names should be included in the recognition activity.
- c. Locating retirees calls for several tactics:
 - (1) contacting ESD media coordinators
 - (2) contacting district media coordinators
 - (3) contacting the State Department of Education staff
 - (4) putting a spot announcement into Spring INTERCHANGE
 - (5)
- d. The OEMA scholarship and awards committee chairperson is responsible for this area.
- e.
- f.

8. To Provide Professional Recognition: Awards and Scholarships

- a. Time in the general meeting or banquet agenda should be set aside to recognize OEMA sponsored scholarship recipients. Recipients should be alerted early, and their attendance costs furnished by OEMA.
- b. Recognition of exceptional contributions by Oregon media specialists, administrators or others who have "made a difference" in media programs for teachers, kids, or college media specialists
- c. Recognition of OEMA committee persons or leaders who have made exceptional contributions
- d. The OEMA scholarship and awards committee is responsible for this activity.
- e.
- f.

9. To Provide Commercial and Professional Exhibits of Interest to Members

- a. The exhibit areas are seen as an integral part of the Conference program and time for exploring these in depth should be designed into the schedule.
- b.
- c.

10. To Provide Leadership Training Opportunities

a. The planning of the Fall Conference is a part of the leadership development activities of the organization, and should be recognized as a source of future leadership for the organization.

b.
c.

11.

12.

B. CONFERENCE POLICIES



1. Conference Location

- a. The Conference shall alternate between the Portland metropolitan area and any other appropriate sites which can handle the group for housing and session scheduling in alternate years.
- b. Conference site planners should also consider east/west/north/south locations.
- c.
- d.

2. Conference Scheduling

- a. The Conference shall be scheduled for Statewide Inservice Day (the second Friday in October) in odd-numbered years, and on any other appropriate fall date in even-numbered years.
- b. The President-elect and (1) other OEPA Board member are responsible annually for acting as Site Selection Committee for the Conference to be held three years hence. Working with the Board, they select a city, a hotel or other site, and make the contacts to schedule and hold the date. In subsequent year, the Board and following President-elect appoint Conference Chairperson(s) to hold or re-select a site, and thence to plan the conference. (Though the President-elect cannot be "held accountable" for legalities in this process, the sites which can be appropriate for a Conference of this size are limited. Particularly in Inservice Day Conference years, sites must be nailed down longer than two years in advance.)
- c. Much discussion has been focused on whether hotels, convention centers, or campus sites are "best" for Fall Conferences. It is wise to consider the following:
 - (1) number of attendees expected (housing and human services)
 - (2) type of programming (large/small group meeting spaces)
 - (3) cost of site (which usually interacts with number of attendees)
 - (4) time of year (commercial sites may be less expensive)
 - (5) set-up time for events and exhibits
 - (6)
- d.
- e.

3. Limitations on Social Events

- a. Cocktail parties are referred to and managed as "no-host social hours."

- b. Alcoholic beverages may not be included in registration fee nor paid for out of OEMA funds.
- c. Door prizes, if included in Exhibits activities, are not paid for out of OEMA funds.
- d. Retirees and scholarship recipients may have their meals and travel and lodging paid from OEMA funds. (This is reviewed annually, depending on the size of the group in question.)
- e.
- f.

4. Limitations on Payments to Visiting Dignitaries

- a. National officers of AASL, AECT or other organizations may have all or a portion of their expenses paid if:
 - (1) not more than one national officer is invited
 - (2) the officer makes a substantial contribution to the Conference program and other local events
 - (3) the invitation is agreed to by the OEMA Board and the Conference Planning Committee; a written agreement is made
- b. Any presenter may have all or a portion of his/her expenses paid, as per (3) above; a written agreement is necessary.
- c. A main speaker may be paid an honorarium appropriate to his/her ability to contribute to the Conference if:
 - (1) there is money enough in the budget
 - (2) agreements can be made between speaker (or agent) in writing
- d.
- e.

5. Limitation on Payments to OEMA Members for Conference Activities

- a. Members are not reimbursed by the organization for travel or any other personal costs resulting from Conference attendance
- b. Members may be reimbursed for travel or any other personal costs incurred while planning the Conference, as long as they have been agreed to by the Conference Planning Committee in advance and in writing.
- c.
- d.

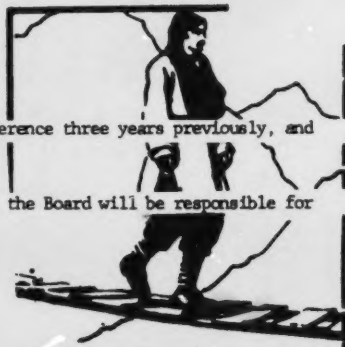
6.

7.

C. RESPONSIBILITIES OF THE OEMA BOARD TO THE CONFERENCE PLANNING COMMITTEE

1. Setting the Date

- a. The OEMA Board will have set the date for the Conference three years previously, and verified it in following years.
- b. If the date is changed by subsequent Board action, the Board will be responsible for immediate action on site re-verification.
- c.
- d.



2. Selecting the City and the Site

- a. The OEMA Board will have selected and held a city and a site within the city three years previously, and verified it in following years.
- b. If the site should become unavailable or inappropriate in the opinion of the Board, the Board will be responsible for immediate action on site identification and contract for dates.
- c. The OEMA Board will be responsible for reviewing the criteria for site selection (as listed in I B 2 c under POLICIES) before finalizing their choice of site.
- d.
- e.

3. Underwriting Costs for Conference Planning

- a. The OEMA Board will direct the Treasurer to instruct the Site Selection Committee and the Conference Planning Committee in procedures for conference expenditure accounting and to assist in setting up an account for "seed money". (Income from exhibits and registration will replace this seed money, but it is several months away.)
- b.
- c.

4. Advising the Conference Planning Committee

- a. The OEMA Board is responsible to advise where appropriate, but not to direct.
(Advice on past customs is appropriate; discussions or decisions on programs are not.)
- b.
- c.

5. Legal Responsibility for Contracts

- a. The OEMA Board is finally responsible for all costs or actions resulting from Fall Conference contracts; the Chairman of the Fall Conference, must, however, have kept the Board fully aware of such agreements.
- b.
- c.

D. RESPONSIBILITIES OF THE CONFERENCE CHAIRPERSON TO THE OEMA BOARD



1. Accounting for All Funds

The Chairperson will work with the OEMA Treasurer to set up appropriate procedures for accounting for all incoming and outgoing funds connected with the planning of the Conference.

- a.
- b.

2. Submitting a Conference Budget

The Chairperson will devise a budget-estimating procedure for creating a realistic budget, presenting it to the OEMA Board for approval, and consistently monitoring expenses (in cooperation with committee chairpersons and the Treasurer) for reporting to the Board.

- a.
- b.

3. Submitting Progress Reports at Each OEMA Board Meeting

The Chairperson will compile a written report on the progress of the Conference program, exhibits, and budget for the quarterly Board meetings.

- a.
- b.

4. Programming Decisions for the Conference

The Chairperson, in cooperation with Committee Chairpersons of the Conference, will be responsible for making final decisions for the entire conference -- to the OEMA Board and to the Conference Site staff.

- a.
- b.

5.

6.

II CONFERENCE ADMINISTRATION

by Maggie Thorn
1976 and 1977
Portland



A. THE ROLE OF THE CONFERENCE CHAIRPERSON

1. Seeing the Whole Picture

- a. The general chairperson is the only person in the Conference Planning Group who can - AND MUST - constantly see and review the whole picture.
- b. The role calls for:
 - (1) facilitating, rather than criticizing or negating
 - (2) expediting, rather than just monitoring and querying
 - (3) generating ideas, rather than carrying them out
 - (4) initiating action, rather than waiting for others' actions
 - (5) contacting, rather than waiting for calls or letters
 - (6) planning, rather than management by crisis
 - (7) delegating, rather than messing about in trivia
 - (8)
 - (9)
- c.
- d.

2. Anticipating Pitfalls and Crises

- a. A careful reading of this handbook will furnish a litany of pitfalls and possible crises which is guaranteed to keep any conference chairperson to the straight and narrow path of competent administrating.
- b. Meeting with at least two previous Conference Chairperson can add to one's store of terrors to be avoided; the inflections and shudders which accompany their stories will be unforgettable punctuations to history.
- c. Memorizing the oft-repeated "He who does not read history will be doomed to repeat it" can be an additional prod to the careless or too-optimistic leader of conference planning groups.
- d.
- e.

3. Delegating As Much As Possible

- a. By applying the rule "Measure the process; eschew the content," one can successfully delegate most tasks without feeling as though the fun and rewards are going to the Conference Committees only. Assume that others may focus on tasks; you must remain in contact with the Big Picture of what is going on at all times.
- b. That which you delegate, you can monitor or measure; it is more difficult to get a measure of what you yourself are doing.

- c.
- d.

4. Finding Someone to Keep You Honest

- a. A Board member (perhaps the Past-President) or a former Conference Chairperson, if used well, can keep you from feeling as though the task is too big to carry alone. Ask them for their experience or their opinions; it will give you alternatives from which to make decisions.
- b.
- c.

5. Planning Agendas for Meetings

- a. Send agendas out before the meeting.
- b. Design agendas for variety, involvement and pleasurable activities.
- c. Be sure the recorder is picking up on the process of the meetings as well as the content. (Who/what/when/why notes on meetings are sometimes more helpful when reviewing past events than all the memory attempts of the group)
- d.
- e.

6. Getting Agreements in Writing

- a. Summarize meetings before you end them; send out minutes right away.
- b. Review tasks with Committees to make sure they know the expectations.
- c. Visualize - with chartboards or pencil and paper - as much as possible.
- d. In working with non-committee people or with the OEMA Board, be sure to get their words down for your records.
- e. Add to the Conference Planning Leader's Handbook CONSTANTLY.
- f.
- g.

7. Don't Let the Theme Direct the Conference

- a. A good theme evolves as the Conference grows; it doesn't restrict.
- b. A theme may sound catchy at the time - but will it stand the tests of time, repetition and new ideas?
- c.
- d.

8. Start Small

- a. Get input from the OEMA Board as soon as you are appointed.
- b. Put together a small planning group first, who understand their role as a task force

for planning a Planning Process". Use them to get started, then dissolve or absorb them into the Conference Planning Group.

- c. Then build your Big Picture.
- d.
- e.

9. Use the Conference Planning Leader's Handbook With Committees

- a. Use it as a text to start from.
- b. Insist they annotate it with you.
- c. Challenge its contents with them.
- d.
- e.

10. Know Your Audience

- a. Analyze past Conference attendance patterns.
- b. Study Evaluation Reports on session topics: which need repeating?
- c. Remember the Big Picture in who's involved (or should be) in media; are there sessions for all?
- d.
- e.

11. Remember the State Department of Education

- a. Their role is unclear to most media specialists; help clarify it.
- b. They have much to contribute if asked early and held to task; get it in writing.
- c. Invite them to sit with honored guests and with sessions.
- d.
- e.

12. Balancing Print and Non-print

- a. Remember that storytelling can be done with lots of media.
- b. Present well-proven practices as well as "new stuff"; there will always be new recruits in the field who haven't yet learned all the tricks.
- c. Bring in presenters from outside the profession; it makes both them and us take another look at the Big Picture.
- d.
- e.

13.

14.

B. SELECTING CONFERENCE EXECUTIVE COMMITTEE

by Jim Maxwell
1979
Eugene



1. Objectives (Committee)

a. Preplanning

(1) timeline

The timeline for a conference actually begins when an Association officer activates the process to select a Conference site and date. This should be at least two to three years in advance of the event. The timeline extends past the Conference until bills are paid, evaluations tallied and summarized, letters of appreciation written on all other activities associated with wrapping up the Conference are completed.

A conference timeline is dynamic when used as a management tool. It is dynamic from the point of view that, after its creation, additional projected tasks should be added as they are identified and dates and task descriptions should be changed as appropriate. At any time in the planning, holding, or wrapping up the Conference, the executive group should be able to examine the timeline to determine tasks that have been or should have been completed and to identify tasks remaining to be done.

The timeline used by the executive group may include only limited narrative (brief task descriptions, deadline data and the responsible committee or individual) while the "sub-timelines" developed by each committee chairperson may include substantial amount of detail.

(2) budgeting

The guiding concept in developing the initial budget is that projected conference expenditures should not exceed projected conference income. There are two ways to bring about this state of balance: modify projected expenditures, usually through decreasing them, or modify projected income, usually through increasing it.

Conference planners should project generous amounts of expenditures for elements of the program. Attendees are attracted by high quality programs. High quality programs usually cost a substantial amount of money. The conference executive group should not expend a great amount of energy attempting to cut costs at the expense of quality. If additional income is needed for a quality conference, registration fees and/or exhibitors' fees should be increased to accommodate this need.

After projecting all anticipated expenditures, an amount for unanticipated costs should be included. A rule of thumb for contingency is 10% to 20% of projected expenditures.

(3) needs assessment

The only important outcome of all the planning and effort that takes place prior to and after a conference is that which attendees experience in the 24 to 36 hour period while the conference is in session. Because of this simple, but often overlooked fact, it is important to not only project the needs of the conference attendees but also the constraints or forces that must be overcome in meeting those needs.

(a) site

You may plan the site around the conference or plan the conference around the site. Some site constraints include the type and number of rooms, including sleeping rooms, meeting rooms, film preview rooms, idea rooms, and all others that might be needed for the conference. Parking, exhibit space, auditorium space, banquet facilities, and luncheon facilities may be other site limitations.

(b) transportation

Transportation to the Conference is important to consider. In spite of well planned and publicized bus system for the 1978 Medford meeting, buses were dropped because of lack of interest.

Transportation during the Conference is also an important consideration. Shuttle buses at the 1977 Portland Conference that ran between exhibits in the Ice Arena and the Red Lion were well used, well planned, and well accepted by the attendees. A split Conference site usually results in attendees straying, therefore, shuttle bus service is extremely important.

(c) needs of attendees

Identify your target audience and define program needs. This can be done by referring to evaluation reports from prior conferences, brainstorming with a representative sample of OEMA members, being aware of new developments in the field, and being aware of the diversity of needs of the membership.

(d)

(e)

(4)

(5)

b.

c.

2. Consideration of Co-Host

a. W AECT

b. OLA

c. OASL

d. International Reading Association

e. OEMA affiliates

f. Historical society

g.

h.

CA 5

3. Meet OEMA Objectives (See I.A.)

4. Suggested Makeup of Planning Committee

This committee should have paid secretarial support. An individual can be hired at prevailing local rates to carry out clerical and secretarial duties for the planning committee, registration committee, and other committees whose work would be substantially aided by such an individual.

- a. OEMA President
- b. Commercial person who represents Exhibitors' Association
- c. Conference evaluator
- d. Conference treasurer
- e. Immediate past-Conference chairperson
- f. Registration chairperson
- g. Exhibits chairperson
- h. Hospitality chairperson
- i. Publicity chairperson
- j. Site chairperson
- k. Equipment chairperson
- l.
- m.

5. Differences in Committees in Metropolitan and Rural Areas

- a. A rural Conference will need to draw committee members from a larger geographical area. It may be that the program and hospitality committee is in Medford, publicity in Coos Bay, registration in Roseburg, and exhibits in Klamath Falls. The Executive Committee must meet monthly for the 12 months to coordinate.

In an urban area, all of the talent may come from Portland or Eugene.

- b. Support services outside OEMA will vary. Portland, for example, has a convention association which will assist with various services to be noted later. In smaller towns, chairpersons may look to the Chamber of Commerce or downtown merchants' associations.
- c. Each year it becomes harder to find a suitable facility outside of Portland. In the future, Conference attendees may be advised to expect some discomfort in smaller cities or Conferences may need to return to school buildings (situation objected to by most attendees).
- d.
- e.

7. Suggested Procedures of Planning Committee

- a. Meet monthly
- b. Start twelve months early
- c. Select committee people who can attend meetings
- d. Ask for monthly progress reports from each person
- e. Have a minute by minute conference think-through. (See sample in 1979 Executive Committee Notebook)
- f.
- g.

8 8.

9.

C. PITFALLS

1. Trying to Decide on a Theme

- a. If a theme doesn't offer itself naturally from the site, program or something else, don't get bogged down in brainstorming catchy phrases and inspiring rhetoric.
- b.
- c.

2. Keep Committees Co-ordinated

- a. Don't let the program committee get too far with plans before the board or executive committee has given their input.
- b. It is smoothest, if executive committee has its say before the program committee is formed. The program folks then may proceed with a clear understanding of their mission without fear of further interference (which is almost always resented).
- c.
- d.

3. Be Sure to Delegate Responsibility

- a.
- b.

4. State Department Inclusion

- a. The State Department may want time on the program. Be sure to ask early and make it clear that the program cannot be trifled with after it is underway.
- b.
- c.

5. Saturday or Not?

- a. Saturday sessions have proved to be a miserable failure in spite of big name speakers.
- b.
- c.

6. Reimbursements

- a. Establish guidelines for reimbursement of committee members, presenters, speakers and helpers at the first meeting.

b. Copies of previous conference policies are filed in the sample notebook under "Executive Committee".

c.

d.

7. Involving Interest Groups in Planning

a. Involve representatives from all interested areas in the program committee. (Building level, district level, print, non-print, Higher education.)

b.

c.

8.

a.

b.

9.

a.

b.

III DELIVERY TO ATTENDEES

by Jim Heath
1978
Medford

John Albrecht
1978
Medford

A. PROGRAM COMMITTEE

Nicola Laird
1979
Eugene

1. Selection of Topics

- a. Meeting requirements of membership. The first responsibility of the program committee is to assemble a program which meets the needs of the attendees. The following matrix assembled for the 1977 conference outlines the scope of this task.

	Building	District	Higher Ed.	Commun.College	Community
Library/Media					
Curric.Spec.					
AV/TV Spec.					
Sch. Admin.					
Para. Prof.					

In 1980 the Eugene Committee, after reviewing the '79 registration forms was able to determine what percentage of attendees were represented by each group and so weigh the offerings accordingly.

- b. Types of conference sessions. Having determined the audience, you may wish to review the types of presentations which are available to conference planners. It is helpful, at any conference for media professionals, to demonstrate a variety of presentation methods. Here is a partial list of options:

- (1) Authors
- (2) Speakers
- (3) Workshops
- (4) Credit workshops
- (5) General Session
- (6) Demonstrations
- (7) Occupational special interest
- (8) Skill practice groups
- (9) Study tours
- (10) Seminars
- (11) Panel discussions
- (12) Hands on with demonstrations and practices
- (13) Lounge area, Lucy booth, rest area
- (14) Follow-up of major speaker with rap, or panel or discussion groups
- (15) Mediated presentations (sound/slide)
- (16) Idea room
 - (a) Suggested list of supplies
 - (b) Suggested procedure and practices
- (17) Film or T.V. preview
 - (a) Suggested list of supplies



- (b) Suggested procedures and practices
 - (c) Selection
 - (d) Delivery of films to conference
 - (f) Plan for projectors, lamps, reels
 - (g) Screens
 - (h) Projection operators pay, hours
 - (i) Publication of program
 - (j) Returning media
 - (18) Job exchange
 - (19) Exhibits (Leave one session for exhibits only.)
 - (20)
 - (21)
- c. Possible sources for presenters and speakers. Your major task is going to be to match presenters to attendees. Here is a partial list of possible sources for presentations:
- (1) AECT or AASL regional coordinator or president
 - (2) State Librarian
 - (3) State Department of Education
 - (4) Last years conference evaluation
 - (5) Last years successful sessions
 - (6) Previous OEMA programs (see sample notebook)
 - (7) Portland area librarians
 - (8) Regional OEMA groups
 - (9) OEMA intellectual freedom and continuing committees
 - (10) OEMA affiliate organizations
 - (11) Speakers heard at national conferences (AECT, AASL)
 - (12) Speakers who will be appearing at other conferences scheduled for the same day
 - (13) Persons closely associated with current developments in education, media or who's area of expertise will soon affect media people
 - (14)
 - (15)
- d.
- e.

2. Program Decisions

- a. How many different presentations to have. The number of presentations ranges from 10 in 1979 to 38 in 1975. Your decision will be based upon the variety of attendee interest, available presentors, expected attendees, budget, but most of all on the number of available meeting rooms. You may not have

- as many rooms in a rural facility as in those in the Portland area.
- b. How many and which sessions to repeat. Your decision here may be based upon last years conference evaluation as well as those considerations rated above.
- c. How long should sessions last? Each year there are complaints that presentations are either too long or too short. The skill of the speakers may be the determining factor. Experience has shown that 60-75 minute blocks are the best received.
- d. What modules? Certain presentations may be blocked into double sessions and these blocks may be arranged.
- e.
- f.

3. Opening the Conference

The official opening of the conference may be handled in a variety of ways: a host social hour, buffet, entertainment, keynote addresses, presidential addresses or by the exhibits. The standard format has been by sponsoring Wednesday or Thursday evening warm up events, such as exhibits and social hours followed by the official presidential welcome the next morning. This does not have to always be the pattern.

4. Co-ordination with other Committees

The program committee is the workshop conference. All other committees are there to serve attendees needs while they absorb the program. Co-ordination of this complex, multiple event extravaganza can make or break the conference.

a. Co-ordinate presenters

Correspond with presenters for descriptions of their presentations and explain to presenters what their audience expects of them. A sample "presenter information form" is in the sample notebook. The hospitality committee must be advised of when, where and which presenters will need picking up at the airport. The registration committee and the treasurer need a list of presenters and what complimentary tickets each will receive. The publicity committee will need a copy of the presenter information form for news releases and directional signs. Publicity will also need some photographs for news releases. Presenters will need to know their room locations, host's names, whether or not you or they will pay for rooms, how they are to bill you for expenses, how much they are allowed and for what. The equipment committee will want a copy of the presenter information form which tells them what A.V. equipment will be needed.

5. Co-ordination with Facility

a. Program matrix

The hotel will provide a form upon which you will indicate your program rooms where each event is to take place and time blocks. Do not attempt to create your own form until you have checked with the hotel or you waste hours re-filling out their form which in most cases is the only one they understand. The 1980 conference in Eugene has an excellent sample of this matrix in the notebook.

b. Working with hotel co-ordinators

Chances are that the OEMA board or some other authority will have already made contact with the facility before you arrive on the scene. A contract with the hotel has probably already been signed; exhibit halls, banquet halls and lecture rooms reserved. You need a copy of this contract. There may be more than one convention co-ordinator on the hotel staff. Often a sales person makes the original contact and another employee works with you there after.

There should be only one person from your committee to give directions concerning the facility to the convention co-ordinator. Your committee may have a site chairperson for this function. Work through that person.

c. Elements of facility important to program

You will need a map of the facility and matrix showing how many attendees will be accommodated by each room in a variety of seating arrangements. The convention co-ordinator will provide this. You need to know how much time is needed between events in a room to allow the hotel to change the seating arrangement from say, theater style to banquet style.

(See also the facility section) You will need to tell the hotel when and where you need telephone service.

6. Co-ordination of Major Speakers

Beside all of the details listed in sections for presenters, major speakers should be asked to sign a contract which includes their fee, expenses, arrival time, what conference events they are expected to attend and other details. Samples are in the notebook. (See also section I B)

7. Entertainment

Before you select entertainment decide the purpose. It is a questionable practice to spend a considerable amount of registration funds on presentations that have little professional value. Some entertainers, however, have been

given an honorarium or transportation.

Generally, a quality speaker presenting a professional topic for a deserved honorarium has been received better than an amateur entertainer working for a pittance.

8. Affiliate Organizations to Contact for Meeting Rooms

These organizations may want you to reserve time in the program for their meetings.

- a. OEMA Board (Phil Corson or any officer)
- b. GRAFICA (Tony Smith or any ESD graphic artist)
- c. OEETA (Ralph Cook, LOC or any ESD technician)
- d. Exhibitors (Usually meet two hours before exhibits open. Vince Coleman, Audio Visual Supply, or any Oregon vendor)
- e. D-OEMA (Viv Zielinski or any district media person)
- f. ARMCO (Mary Kerns or any ESD-DMC Director)
- g. Intellectual Freedom committee (Jerry Deats or OEMA President)
- h. Continuing education committee (Jerry Deats or OEMA President)
- i. Special librarians
- j. Southwest Washington media specialists
- k. Region IX leadership council (Jerry Deats or OEMA President)
- l. Higher education media council (Jerry Deats or OEMA President)
- m. Spring conference chairpeople
- n.
- o.

9. Thank You Notes

It is best to ask each committee person to write his or her own notes. The Committee may want to have special notes printed. Thank you notes are usually sent to each presenter and each OEMA person who helped in any capacity. More information on the notes is located at the end of this manual.

10. Tours

Tours should be considered as a concurrent session option with educational value equal to other sessions. Any other kind of tour is not worth the time and effort required.

a. Procedure

- (1) Determine tour possibilities in area of conference site.
- (2) Contact facility to arrange for tour. Specify your educational objectives and identify potential participants so they can tailor the tour for the group.
- (3) Identify the tour guide as soon as possible and determine what the

tour is to include.

- (4) Offer tour in conference mailing and require indication of intent from conference registrants so final plans can be made.
- (5) Make departure time and place clear to all participants early and often so you can start on time.
- (6)
- (7)

b. Costs

- (1) Transportation. Commercial buses are expensive. School buses are often not available for non-school charter. The use of private cars and reimbursement to owners at an equitable rate is recommended.
- (2) Tour guide/host facility. Some facilities charge, but most do not. Some (museums, etc.) ask for donations, which should be made based on the number of participants.
- (3) Costs should be an integral part of conference registration. A separate charge for tours is a nightmare for accounting and is not justified if tours are considered part and parcel of the conference educational program.

(5)

(6)

c. Publicity's role in tours

Publicity should have considerable involvement in the final planning for tours. A flyer should be designed, especially to explain tours and arrangements that delegates will need to make in signing up/ paying for them.

d. Pitfalls

- (1) Charging separately for tours cannot be justified and is a headache for treasurer and/or registration folk.
- (2) Arranging tours that require too much travel time, total time, travel and tour, should not exceed time allotted for two other sessions.
- (3) Arranging tours that do not have bona fide educational value for participants.

(4)

(5)

e.

f.

11. Closing the Conference

a. Banquet

While most CEHA conferences have been closed with a banquet, speaker and awards this is not mandatory. Awards were presented at the noon membership meeting in '78. The conference started with a banquet in '77. People are sometimes tented to pay attention to

serious speaker after a long day and a large banquet. The traditional pattern of banquet and speaker has proved most agreeable to most people, but it is not mandatory.

As program committee, your job is to decide if and when to have a banquet. The hospitality committee will decide on the food. The site committee will select a room of appropriate size. (See summary chart for a hint as to number to plan for.) The fall conference chairperson will help you decide who sits at the head table.

b. Speaker

- (1) You may choose an inspirational messenger for your final speaker.

This type of final speaker may have the job of charging tired conferees with the ambition to "go home and put all these good ideas to work." If the speaker follows a banquet, the delivery must also overcome the doldrums brought on by alcohol and food. For those conferees who will be staying over, this is their last night in the city and they will scarcely be attentive to the marvels of networking until 11:30 p.m. With all this going against your final speaker, you have this going for her/him. The conferees are, by this time, thoroughly disentangled from the worries and cares of the office. They are alight with the glow of professional growth and many now eagerly anticipate this intellectual dessert to their feast of knowledge. Give them Bananas Foster, flaming baked Alaska and they will praise the conference as the inspiration of the year.

The speaker must have a good speaking reputation. Use only speakers recommended by OEMA professionals who have heard them in person. He or she must be a person whom professionals respect. His or her speaking ability and diction must be correct.

- (2) You may choose an entertaining speaker. Many conferences use the inspiring speaker as a keynote speaker and follow the banquet with a non-media professional whose experiences broaden and whose speech entertains. This is very successful after a banquet. Spencer Shaw, the story teller, was professional, entertaining, and inspirational for many in Eugene in 1979. The tug boat captain at the winter workshop in Astoria in 1980 was broadening, entertaining, and interesting, though not a media professional.

c. Personal goal setting process

As an alternative, a personal goal setting process might motivate conferees to summarize what they have learned and transfer the conference experience to their work situation.

Goals acquired at the conference could be prioritized. Personal time lines could be created. Personal schedules could be created to allow time for accomplishing the goals.

d. Awards

Recognition of scholarship awards and retirees is important enough to require a separate OEWA committee.

(1) Scholarship recipients may receive free registration, dinner and their scholarship.

(2) Retirees may receive free registration, dinner and a gift.

This is decided each year depending upon the size of the group of finances.

e. Introduction of new officers

You may wish to use the conference closing to introduce next year's president and officers and committees.

f. Entertainment

For a word on entertainment see the beginning of this chapter.

g. Timing

You may wish to present the awards, introduce the new officers and make your thank yous before the final speaker (or before the salad) so as to reduce the anxiety of those who have theater tickets for 10:30.

h.

i.

12. Written Program

a. Mandatory inclusions.

Understanding that the primary purpose of the written program document is to inform delegates of time, place and subject of sessions offered at the conference, it follows that particular attention needs to be given to the formatting of this information. Essential information for the schedule of concurrent sessions is the following:

<u>Time</u>	<u>Topic</u>	<u>Presenter</u>	<u>Location</u>
-------------	--------------	------------------	-----------------

While the time, topic, and location will take a limited space, the information for presenter can be lengthy and therefore present a challenge to the designer. It can't be emphasized too strongly that there is a need for a brief description of what exactly is to be presented e.g. use of audio visuals, to whom the information is directed, any special emphasis being given, etc. This kind of information should be gathered on the "presenter information sheet" sent out by the program committee. On this sheet, the questions should be asked individually so that the objectives of the presentation and intended audience can be easily determined.

A couple of additional thoughts for the designer. Consider the reader (the rushed and befuddled delegate) who needs lots of information presented and in the clearest and most concise format.

Use bold face type to highlight important points (like the session title) and arrange the sessions in time blocks so that the reader can easily see quickly everything that is offered in one time block.

b. Optional inclusions

- (1) OEMA Board
- (2) Conference Committees
- (3) General information - directions to special events or places not listed elsewhere
- (4) Photos of keynoter and banquet speaker and other notable guests
- (5) Film festival showings
- (6) Map of the conference site
- (7) Table of contents

c. Pitfalls

- (1) Proofreading--In addition to continuous proofing by the publicity chairperson, the proofing should be done together with the program committee chairperson and key members of the steering committee.
- (2) Printing should not be done until the last minute. Discuss the time needed for printing with the selected printer (figuring the delivery date to be the day before the conference.) Work the timeline back from there.

To attempt to print any earlier will lead to inevitable frustration as many last minute changes that will be reflected in the program are simply unavoidable. The following suggested time line is based on an Oct. 10 conference.

Decide on format	June 1
Set up process for gathering information:	
- photos (if included)	August 1
- description of sessions	August 1
- pre or post conference events (if included)	August 1
- film festival (if included)	August 1
- other	August 1
Information to graphics	September 1
Proofing with program chairperson	September 10
Proofing with steering committee	September 15
To typesetter	September 22
To printer	October 1

13. Program Pitfalls

a. Being penny wise

Don't skimp on your speakers. Good speakers will pay for themselves through added conference registration revenue.

b. Book speakers early.

Good speakers are frequently booked 6 months to a year ahead.

c. Planning room size.

You must be able to estimate the size of the rooms you'll need by gauging audience appeal of the speaker. To do this you must know the make up of your attendees. There is information in the "Facilities" section on how to estimate room space per attendee.

d. Attendees who play hockey.

Attendance rosters show that about 1/3 of the registered attendees will be unaccounted for during any session. These may be at exhibits, in idea rooms or just gone.

e.

f.

B. EXHIBITS

by Richard Bröckman
1979
Eugene



1. Needs Assessment

a. How many to plan for.

Plan to make maximum use of the exhibit area, as vendor response (with proper announcements and follow-up) will exceed the limits of most Oregon facilities considered for such a conference ('79 conference filled 121 tables in accepting reservations of 87 vendors. Several late requests were refused due to lack of space.)

b. Booths

- (1) Size - booth size will vary but 12' x 10', 10' x 10', or 10' x 8' are common. It is important that accurate size information be included in vendor correspond.
- (2) Aisle width - a 13' aisle is preferable for anticipated heavy traffic, going to as low as 12' minimum where hall size is restricted.
- (3) Tables or booths - each has its advantages. Tables are usually less expensive and more tables can be accommodated in a limited space. Booths can handle a larger and more attractive display. A booth will also require a table(s). It is also important to remember that most vendors prefer to work in front of the displayed materials rather than behind them.
- (4) Decorators - would probably only be used with a booth display. Many vendors, knowing of a booth exhibit, will supply their own banners. However, some exhibit halls will not be available without a decorator contract.
- (5) Supplies - request a listing of supply items needed from vendors through correspondence. Additional general supplies needed include such items as electrical cords, masking tape, straight pins and push pins, marking pens, poster board,

twine, hand truck(s), AV cart(s), table covers, etc.

c. Selecting the hall

- (1) Electrical energy - electrical needs to be determined by anticipated number of tables/booths. As a guideline, figure a minimum of one outlet per table/booth. Contact the facility engineer for information regarding permissible load per circuit and number of circuits available.
- (2) Water - need for water will be determined by services to be provided.
- (3) Security - protection of the exhibits should be provided if exhibits are to remain "up" overnight. A licensed security person should be employed. A written agreement or contract specifying charged responsibility conditions and financial terms is in order.
- (4) Hospitality - coffee and tea are expected and welcome in exhibit area. However, soft drinks and food items are discouraged. Tape recorders and coca cola do not mix.

d.

e.

2. Setting the Fee

A recommendation to the Executive Committee for the charge per table/booth should be based on:

- a. All expenses connected with exhibits operation, e.g. hall rental, security, publications, postal expenses, decorators fees, etc.
- b. The amount needed to assist with other conference expenses, e.g. speakers which attract audiences who will view exhibits.
- c. An amount to assist with organization operations throughout the year.
- d. The total of the above considerations should be established within reason and should be consistent for shows of similar size and scope. Feedback indicates that fee consistency for similar size shows is especially appreciated by the vendors for their planning purposes.
- e. The final consideration, of course, is the amount of financial support needed in relation to the other known means of support, such as registration fees, etc.

f.

g.

3. OEMA Wiring Harness

The wiring harness is a collection of extension cords, owned by OEMA, used for providing electricity to booths.

- a. Who has it? Following the 1979 OEMA conference the wiring harness

was stored at Lane ESD. For further information it is suggested that a contact with Jim Maxwell at Lane ESD be established.

- b. How many outlets? The wiring harness is made up of a long cable of approximately 50' in length with a four plug outlet at about every ten feet. There are a least five of these harnesses.
- c. The harnesses are made up of extremely heavy cable, and, as a result they are very heavy and difficult to handle. They are also in heavy boxes. Don't send a boy to get them.
- d.
- e.

4. Security Guards

- a. Where needed? A security guard should be provided anytime that the display items are left standing overnight. Security should come on duty approximately one half hour prior to the close of the exhibit area and should remain on duty at least one half hour after the exhibit area opens the following day. Security guards should be provided with explicit directions as to their responsibilities and activities during the time that they are on duty. If there are special directions or conditions, e.g. carry weapon, be explicit, and don't be bashful about giving directions. In determining the fee, one consideration is to take a survey of two or three agencies which provide this kind of service. In fact, it could even be desirable that a security officer be hired from such an agency. However, an off-duty policeman who would also be licensed to perform the duties required is another option.
- b. Fees? Fees should be comparable to local rates.
- c.
- d.

5. Suggested Procedures

- a. Arrange for bulk mail rates for all OEMA conference mail.
- b. Mailing lists. A mailing list of vendors is included in the appendix of this book. However, it does need to be updated on an annual basis. This list emanates from Lane ESD. It is suggested that one return to any of the larger ESD's in the State for annual updating service.
- c. First mailing. The first mailing to the vendors may be in the form of an advanced information bulletin (see appendix). A mailing approximately (7) months prior to the time of the conference is in order. Included with the advanced bulletin should be a return addressed card by which the vendor would indicate back to the Exhibit Committee his interest in participating in the conference. A listing from the card returns can then be compiled and invitations sent to those vendors. A dating of the

cards will serve as verification in case of any questions or need to follow up later on.

Invitations mailed to vendors should provide complete information at this time and should also include a self addressed, stamped envelope. These invitations are mailed out to the vendors approximately a month to six weeks following the mail-out of the advanced bulletin and as soon as enough vendors have responded via the return cards to qualify for bulk mail rates.

Approximately 4 months prior to occurrence of the conference, determine the need for a follow-up mailing of invitations to vendors from whom there has been no response.

Approximately 3 months prior to the conference the exhibit committee should develop a space use plan, that is to allocate the space for the vendors in the display area. Priority is based on date of receipt of invitation by the Exhibit Committee. As soon as space allocations are made, send a confirmation to the respective vendor indicating his space assignment. With the space information, the vendors do appreciate an updating regarding the conference planning and any particular emphasis on theme appropriate to the program.

Yet to accomplish is to determine the accessory needs for the vendors, e.g., electrical needs etc. This information should be available from the application forms returned by the vendor.

- d. Receipts. The information in the letter of application should leave no doubt that full payment is expected with the application return. Do not allow partial or delayed payment from the vendors. Generally, the committee is not set up in their staffing and bookkeeping procedures to handle this. Be prompt about mailing a receipt back to the vendor for the payment for his table.
- e. Assigning spaces. Space assignments are made on a priority of date of receipt of application for space by the Exhibit Committee. Consideration may be given to vendor product categorization, e.g., books, software, equipment and avoid assignments of "like" categories side-by-side or directly across an aisle from one another.
- f. Open to public. The display opening should coincide with the opening of registration. Generally, this will be early in the afternoon the opening day. Also, this will generally be time not competitive with other conference sessions.
- g. Closing time generally runs to early evening of the first night. The opening duration for the time has usually been 5-1/2 to 6 hours. It seems not advisable to remain open beyond 7:30 or 8:00 as there are other on-going activities which distract from those in the exhibit area.
- h. Secured time. Security should be on board at least one-half hour prior to the exhibit closing. Security should remain on duty at least one-half hour following the morning opening.

- i.
- j.

6. Things That Worked

- a. First and foremost planning. It is essential to have a paper plan.
- b. Develop a time line and follow it. Don't allow procrastinations.
- c. In communication with the vendors, be specific. Provide full and adequate directions as to what they can expect and what is expected of them.
- d. Demand full payment with application. Don't allow partial or late payments.
- e. Share the responsibility for developing the plan, two heads are better than one, three may be better than two.
- f. Delegate responsibility, let the committee do the planning and have another staff do the work.
- g. Provide a conference or retreat area for the vendors. They will appreciate it.
- h.
- i.

7. Things That Didn't Work

The major negative criticism stems from vendor "no-shows". This creates some hard feelings on the part of vendors who are there and who see choice tables that are not occupied. It is suggested that vendors understand that tables not occupied at least one-half hour prior to the scheduled exhibit opening may be reassigned by the exhibit committee. No refund for "no shows".

8. Suggested List of Supplies

Besides the OEPA wiring harness, have several extra extension cords on hand, as well as several rolls of wide masking tape, straight pins, scissors, push pins and table covers if not supplied by the local establishment.

9. Exhibits Time

There should be a time (usually first day) for the exhibits which is not competitive with that of program.

10. Door Prizes

Door prizes may or may not be desired. However, they do have an audience retaining effect. If door prizes are offered, they may be offered on 15 minute, 30 minute or one hour intervals. Because of the value of some

items provided, the committee may designate them as grand prizes where grand prizes are offered once an hour or at the ending of the exhibit activity. Participation in the door prize activity on the part of the vendor maybe handled in one of several ways. Participation should, however, be voluntary and no coercion extended to the vendors. It is suggested at the time the receipt for space payment is mailed back to the vendor a form be included which explains the door prize activity and inquires of their desire to participate. If they elect to participate they can indicate at that time what item they would like to donate for this purpose. They should also be directed at that time to (1) mail prize to the exhibits chairman or (2) definitely indicate that the vendor will deliver the prize to be offered to the Exhibits Chairman prior to the opening of the exhibits arena. Door prizes are awarded as a result of tickets being given to visitors at the time they enter the exhibit area. The visitors should be directed to deposit the ticket or the ticket stub in a designated box in the display area. In this door prize activity a chairman is appointed who will select two or three other people to help him coordinate the activities, such as establishing that the boxes, making sure the tickets are provided to the visitors and helping him with announcing and other responsibilities. Likewise this person is in charge of controlling those prizes at conference time, which prizes shall be distributed or drawn at a given time. This person is also responsible for announcing the drawings. In the 79 conference door prize activity came under the Hospitality Committee.

11. Student Help

This is an area where the vendors have never failed to comment very positively about the amount of help that is available for assisting display set-up and also being available at the time of tear-down activity. Four to six students are usually available during the morning set-up time. Tear down activity is hectic and two or three additional people should be available. It is suggested that students be used and be from an organized club such as a foreign language club, FTA or ski club. This is an excellent opportunity for those students to financially support their club. If the student help comes from school organization, generally the advisor will come and oversee the students. This is an added benefit and a reason to seek help through a student organization. On the other hand, and in the event of no takers, then hire the students outright for a per hour wage. But by all means get a definite commitment from the student. Develop a definite work schedule. One caution is warranted: Generally these students are not covered by any OSHA insurance. Pay it accordingly.

12. Equipment Storage Room

Some of the vendors will want their displays shipped to the conference site from the home office. As a result the displays will arrive early. Be sure to inform the vendors that shipments should not arrive more than two to four days prior to the conference. Generally the facility does not have adequate storage room to hold these items for a prolonged period of time. An equipment room at the conference site should be established as a storage area and base from which to work. The room should also provide housing for somebody assigned to this vendor relations committee. That person would also act as security for the equipment. With the information sheet is also a listing of the equipment needed for the OEMA conference. The form worked well as a method for coordinating the equipment needs. Another couple of items for consideration:

- (1) You might have on hand audio tape duplicating equipment. There may be some presentation which some people would like to have copies of and if you had some equipment on hand you could make tapes available on short order.
- (2) Something that was considered for the previous conference, do a video tape preview of the presenters and have this available on the first day of the conference, stationed at various places with a play back through a video monitor. Just have a video tape preview limited to minute or minute and one half of what the presenter is going talk about or what he is going to present. This could give people some clarification and what they might be interested in and give them a little more insight into what is actually going to take place during the presentation. Be aware however that this will be a very difficult thing to handle in trying to get video tapes of the presenters in some little cameo role and then put this all together and have it available on one tape, probably have dubs and be playing it back in several locations at your conference site.

Several vendors indicated an interest in selling all or part of their display at a significant discount during the conference. It is suggested that the vendor literature address this issue if they want to do this and to gather information on items that would possibly be for sale, and identify those types of items and the participating vendors and make this known in the parton literature, the registration packet and so forth and the directory and then it is suggested that the sales of such items be restricted to the last hour of the exhibit, or possibly the hour following the close for those people who want to participate.

13. Pitfalls

- a. Procrastinations
- b. Avoid verbal commitment. Get it on paper!
- c. Take nothing for granted. Follow up and double check!
- d. Failure to nail down small details cause last minute ulcers!
- e.
- f.

IV SUPPORT SERVICES

A. CONFERENCE TREASURER

by Bev Isackson
1976 and 1977
Portland



1. Suggested Procedures

- a. Obtain from OEMA Treasurer an allowance or allotment to use as operating capital until money starts coming in.
- b. Obtain or create forms for reimbursement of committee member expenses. Establish with conference chairperson guidelines for reimbursement for mileage, meals, etc. for committee members. (Get this in the form of a written policy.)
- c. Establish a gratis checking account at the local bank. It is preferable to get monthly statements. Ask the conference chairperson to sign the signature card only as a precaution in the event that you would be unable to sign checks. You, as treasurer, should be the only one to write checks and make deposits. Keep all of your notes about the smallest details. Find your own rhythm for reimbursements. I tried to withdraw from each meeting for a few minutes in order to write checks for the committee members. They liked the prompt response. I liked not having to spend valuable money on postage or looking up elusive addresses. When Chuck Lehman was treasurer in 1976, people were so delighted with his calligraphy that they didn't mind waiting until the next meeting or the mailman!

d.
e.

2. Accounting Ledger Sheets

Buy sheets with the most columns possible. Even so, you probably won't have enough columns to cover all of the contingencies.

a. Checking account; accounts payable

Suggested columns:

check number/date/written to whom/invoice#*/meals/transp./lodging/office supplies/etc.
(*number you assign to each bill)

b. Checking account; accounts receivable

Suggested columns:

date/amount/from whom/ for exhibitors/for conference/others

c. Accounts receivable; conference attendees

Suggested columns:

sequence number/current date/ name/columns for each item conference fee (lunch,dinner,etc.)

The sequence number is written on each conference pre-registration as it is found to be complete. They should then be filed in alphabetical order by last name.

d. Accounts receivable; exhibitors

Suggested columns:

number in sequence/current date/name/company/table fee/1 or more columns for extras/lunch/dinner

SS 1

OEMA's treasurer may accept this post. You are well advised to twist her/his arm mightily.

3. Conference Meal Functions

a. Attendance guarantees to facility

Be sure the person making arrangements for meals doesn't commit OEMA to too many meals. If the figure specified is 100, OEMA is expected to pay for 100 meals regardless of how many are eaten. Facilities usually expect a rough estimate of the number of diners at the onset, followed by a minimum count 48 hours in advance. A 10% increase is usually acceptable with the hotel.

b. Meal refunds

Our colleagues expect us to play the good guys and refund up to the last minute. It can't be done! Your registration team must be impressed that they are not to give refunds for any reason without checking with the conference chairperson. (Here is a thought: Perhaps the hospitality committee could set up a courtesy table to hold tickets for people who would like to turn them in. No guarantees. First come, first sold). Set a time after which no refunds will be allowed.

c. d.

4. Pitfalls

a. Incorrect arithmetic on the registration form

You and/or the conference chairperson, registration chairperson, or conference committee must decide at what amount of miscalculation you will bill for the amount due or refund the amount of overpayment.

b. Two conferees will register on the same form.

Occasionally two people with different last names will register on the same registration form. This problem can be handled readily. The solution is time-consuming in the beginning, but will prove a great help later.

If you receive a single form for John Doe and Jane Smith, assign the current sequence number (25, for example) to John Doe and make out a new form for Jane Smith, assigning it #26. Under John Doe's number, bracket (#26) and under Jane Smith's number, bracket (#25). This way the two forms are cross referenced.

c. The exhibits chairperson must know what you expect from him or her. Unless advised otherwise, the exhibits chairperson may hand you a dozen checks from exhibitors with no reference as to what charges each check is to cover, or what company is represented by the individual's name on the check. Occasionally the company pays for part of the fees and the individual another part. A registration form for exhibitors is strongly suggested.

d. Gratuities for guest speakers and others.

Guest speakers, program presenters and others who will receive a variety of gratuities should be made known to the treasurer. Specifically the treasurer should know what each is to receive (meals, lodging, transportation, etc.) Most guest speakers never show up at the registration desk. The hospitality committee might be asked to deliver guest packets.

e. Payment for uneaten meals (Editor's note). Bev Isackson emphasizes that accurate meal counts must be turned in to the hotel 24 hours before the meal function. This cannot be stressed enough. Two conferences held as recently as 1980 went

several hundred dollars in the hole, solely because the hotel prepared many more meals than were purchased.

- f. Verify all checks before closing the bank account. After all the bills have been paid, wait 3 months and then check to see that all checks have come in. Even commercial firms hold check for an outrageous length of time before cashing them.

5.

6.



B. SERVICES AND EQUIPMENT

1. Recommendations

a. Provide equipment

Provide the essential equipment that the presenters request. For instance, overhead projectors, 16 mm projectors, carousel projectors, screens, etc.

b. Use good equipment

Make sure all of the equipment is in excellent working order and preferably, newer models. We cannot provide shabby equipment and expect to set a good example.

c. Spare parts

Have spare lamps, cords, etc. to cover anything that might possibly go wrong.

d. Back up equipment

It is a good idea to have back up equipment in case something goes bad or you get an unexpected request.

e. Borrow, don't rent

Borrow as much equipment as possible, then rent that which cannot be borrowed. Try to have the presenters bring their own equipment, if possible. It is what they are familiar with. Borrow or rent plenty of large tripod screens, extension cords (lots of them), and multiple AC outlet boxes.

f. Carts

Have plenty of carts available, both high and low ones.

g. High School Help

Pay some high school AV students to help operate and move equipment around. Pay the minimum wage. It's easy work for a day.

h. Storage area

Storage space is a must!! Have a central storeroom for equipment. Don't leave equipment in the session rooms overnight, but put it in the rooms early in the morning.

i. Vendors may help

Try to have vendors provide some equipment for the sessions. Make sure a sign is visible saying "EQUIPMENT PROVIDED BY _____". This makes the vendors happy.

j. Wall screens

Don't try to use large paper or sheets for wall screens, as they limit flexibility.

k. Verify requests

Contact each presenter that requests equipment to confirm the type of equipment needed. This is important!

l. Scheduling

Try to schedule rooms and sessions so that moving of equipment is at a minimum.

2. Pitfalls

- a. During the 1978 conference, the equipment was carefully put out the night before. The hotel carefully collected all equipment and locked it up. It took 45 minutes to find the projectors and get them back in the correct rooms. Baaaa!
- b. Conference presenters must be contacted by phone to tell equipment needs since they often don't return forms. The program committee needs to call them about other matters and may be asked to solicit this information.
- c.
- d.

3.

4.

C. REGISTRATION

1. Check List for Pre-registration Packet

The publicity chairperson at the Eugene conference had responsibility for having all of the following printing prepared for the pre-conference registration packet.

a. Pre-registration/membership forms
2,000.

b. Motel registration card
1,300.

Some were provided by the Valley River Inn and some were provided by the conference itself through its own printer.

c. Handbill/tentative schedule/conference highlights
3,000.

d. Motel/restaurant brochure
1,200.

e. Request for materials for idea room

f. ODMA membership recruiting handbill

g. Letter of introduction from conference chairperson

h. Brochure of conference site
1,200.

i. Survey of intent to attend specific conference sessions.

j. List of exhibitors

k. Tours handbill
1,200.

l. Idea room handbook
1,200

m. Return envelopes

n. Map

o. Mailing envelopes

10" x 12" size were ordered to be received prior to need for having all material stuffed within them.



2. Check List for Pre-registration Form

The publicity person should meet with the registration chairperson to review and edit the rough draft of the pre-registration form. There may be some information from other committees that should be included on this form and the publicity chairperson will serve in this liaison capacity.

The pre-registration form may or may not contain the membership application form. It should include the following elements:

- a. Name
- b. Mailing address
- c. Date by when form must be postmarked
- d. Make checks payable to: OEMA Fall Conference (Not conference treasurer's name)
- e. Mail form to: Registration Chairperson & address
- f. Identifying information:
 - (1) registration form
 - (2) OEMA Fall Conference
 - (3) Days, month, year
 - (4) Facility
 - (5) City
 - (6) State
 - (7) (8)
- g. Fees (All fees should be prepaid--taking money at the conference is a burden.)
 - (1) pre-registration number
 - (2) pre-registration associate member
 - (3) pre-registration non-member
 - (4) registration at conference - member
 - (5) registration at conference - associate member
 - (6) registration at conference - non-member
 - (7) lunch
 - (8) banquet
 - (9) breakfast
 - (10) study trips
 - (11) credit courses
 - (12) pre-registration - student
 - (13) registration at conference - student (15)
 - (14)
- h. Print on 3-part NCR paper
 - (1) white: OEMA Treasurer (if membership form is part of registration form)
 - (2) canary: Conference records
 - (3) pink: Attendee's receipt

3. Pre-registration Procedures

- a. Mail bulk rate using OEMA bulk permit.
Do not attempt to get your own permit as such permits for organizations are quasi-legal and you might endanger OEMA's permit.
- b. Bulk mail to ESD's where possible.
See "mailing lists" below (#6)
- c. Develop a separate registration form for complimentary registration for vendors.
Have vendor committee responsible for completing these forms.
- d. Set deadline for cancellation of registration and meal tickets.
- e. Set up a pre-registration preparation committee to complete packets for those who are pre-registered.
- f. Send a mail-back card acknowledging pre-registration.

g.

h.

4. Check List for Membership Form

1979 Conference has an excellent example.

a. Must be 8 1/2" wide and 5 1/2" high.

b. Print on 2-part NCR paper

(1) white: OEMA treasurer

(2) canary: attendee's receipt

c. Identifying information

(1) OEMA MEMBERSHIP APPLICATION

(2) date

(3) name (last-6) (first-7) (initial-8)

(4) title (9)

(5) home address (10)

(6) extra address line (11)

(7) city (12)

(8) state (13)

(9) zip (14)

(10) home phone (area 029, number -30)

(11) division (24)

(a) building

(b) higher education

(c) district

(12) type (25)

(a) active

(b) commercial

(c) paraprofessional associate

(d) student associate

(e) non-resident associate

(f) general associate

(13) mailing preference (33)

(a) business

(b) home

(14) school or district (15)

(15) business address (16)

(16) extra line (17)

(17) city (18) state (19) zip (20)

(18) business phone (area 31- number 32)

(19) county of employment (26)

(20) receipt portion

(a) received _____ in payment of _____ membership dues. Thank
you.

(b) date _____

(c) signed _____

(21)

(22)

5. Suggested mailing lists

a. Oregon school administrators.

These should receive letter or handbill and tentative schedule. Labels are available from the State Department of Education.

b. Non-public elementary and secondary schools.

These should receive handbill and tentative schedule. Mailing labels are available from the State Department of Education.

c. OEMA members

These should receive the complete pre-registration packet. Mailing labels are available from the OEMA treasurer.

d. Oregon media personnel who are not OEMA members

These should receive a complete pre-registration packet. Mailing labels are available from the State Department of Education.

e. GRAFICA and OETA members

These should receive a complete pre-registration packet. Mailing lists are available from the president of each group.

f. Oregon Library Association

These should receive a handbill and a tentative schedule. The labels are available from the Portland mailing service.

g. Oregon college and university library and media personnel

These should receive a handbill and tentative schedule. At this point, no information is available on where mailing labels can be obtained.

h. New OEMA members

Some members may not be included in the computer mailing labels or lists since they may have joined after the list was generated. Obtain these names from the OEMA treasurer and mail each of them a complete packet.

i. Non-OEMA members who attended last year's conference

These should receive a complete pre-registration packet. Obtain mailing labels from the OEMA treasurer.

j. Public schools in Oregon.

Each school should receive handbill and a tentative schedule. Obtain the mailing labels from the State Department of Education, match with the OEMA list, and remove duplicates.

k. Mail via ESD where possible. Batch public school and OEMA list for Lane, Douglas, Jackson and Multnomah Counties, and Portland Public Schools, and bulk mail to IMC directors. Send all other via bulk mail through OEMA.

l.

m.

6. Check List for Registration Packet

Having the responsibility for all printing, the publicity chairperson prepares the following:

- a. Registration receipt
- b. Cover letter
- c. Lists of door prizes/drawings.
750.
- d. Door prize tickets
1,600.
- e. Shopping guide for local shopping areas.
1,000.
- f. Things to do in the city.
1,000
- g. Name tags
1,000.
- h. Meal tickets
325.
- i. OEPA membership brochure
1,000.
- j. Conference program
1,200.
- k. Exhibitor's directory
1,750.
- l. Envelopes

Registration envelopes were also ordered to be received in time for stuffing as the pre-registration forms were received.

- m.
- n.

7. Suggested List of Supplies for Registration Tables and Adjacent Area

- a. Two eight-foot tables with six chairs
(Boxes of stuffed registration packets will be here for distribution)
- b. One six-foot table with three chairs
(For receipt of money, memberships and registrations at the conference)
- c. Stand-up height table for attendees to complete registration forms
- d. Ball point pens chained to writing surfaces
- e. Message board -- cork board on easel
- f. Telephone
- g. Message pads (several)
- h. Wastebasket
- i. Money box (locked, if possible)
- j. Money bags (ties to bank)
- k. Counter checks

- l. Receipt books.
 - m. Change (paper and coins)
 - n. Office supplies in box
These include masking tape, felt tip pens, pencils, ruler, scissors, thumb tacks, paper clips, straight pins, scotch tape, rubber bands, etc. RR board for impromptu signs.
 - o. Easily read, easel type signs to designate each portion of registration area.
 - p. Extra copies of all materials in registration packet.
 - q.
 - r.
8. Suggested Procedures for Use at the Conference Registration Desk
- a. Organizing packets
Alphabetize all pre-registration envelopes by last name, divide into manageable quantities, and assign one attendant per section of the alphabet.
 - b. Problem desk
Set up a "problem" pre-registration desk for handling all irregular pre-registrants. (Those who sent incorrect amounts of money or who didn't provide complete registration information.)
 - c. Problem referrals
Refer "problem" pre-registrants from the regular alphabetical location to problem desk via a dummy envelope in the regular alphabetical order.
 - d. Community clerical help
Seek clerical assistance from the Chamber of Commerce or other convention-promotion organizations in the community.
 - e. Late registrations
Set up well-staffed registration desks for late (on-site) registrants.
 - f. Change
Have adequate supply of change at registration desk. Have a supply of telephone change also.
 - g. Telephone
Have a phone at the registration desk.
 - h. Office hours
Keep registration tables open throughout the conference.
 - i. Security of money
Seek assistance from hotel security personnel in transporting money from desk, the hotel safe or deposit location.
 - j.
 - k.

9. Name Tags

These are frequently available from the local Chamber of Commerce or other sources.

Two types are available: 1) pin on and 2) stick on. The decision as to which type to use will depend on each registrant. Preference will depend largely on what the registrant is wearing.

- Type name as large as possible.
- Include place of employment on name tag.
-
-

10. Pitfalls

- a. Refunds

Do not give refunds during registration. Take written requests and mail out later.

- b. Inaccurate registrations

A certain percentage of pre-registrants will be inaccurately registered. These will include incomplete registration forms and inaccurate amounts of money having been sent.

- c.
d.

11.

12.

D. PUBLICITY

By Nicola Laird
1979
Eugene



1. Publications, Editors, Deadlines, Addresses

The following are items that need to be developed, designed and printed.

<u>Publications</u>	<u>Editor</u>	<u>Addresses</u>
Ads for Interchange Spring-February (advance notice); Fall-August (2-page w/ tentative schedule); Winter-November (summary)	Vivian Zielinski	Marion ESD 3180 Center Street Salem, OR 97301
EduGram (Fall issue)*	Larry Austin	Oregon Dept. of Education 700 Pringle Parkway SE Salem, OR. 97310
OLA News (Summer Issue)	John & Nadine Purcell	Library Processing Center 1915 Hazel Street Medford, OR. 97501
Oregon Education (Fall issue)	Mary Don	1 Plaza Southwest 6900 S.W. Haines Road Tigard, OR. 97223
VIDra	Paul Hanson	P.O. Box 3623 Portland, OR. 97208
Council of Teachers of English	Barbara Gates	Madison Jr. High 875 Wilkes Drive Eugene, OR. 97402
Graphica		P.O. Box 1435 Beaverton, OR. 97005

2. Production

a. Signs

The motto one should hold to when doing the planning for signs is "you never have too many." However, the quality of the sign making is critical. If they are not pleasing to the eye or easily read, they may as well not be there at all.

The following is a list of the signs needed.

<u>Sign</u>	<u>Contact</u>	<u>Deadline</u>
1. Signs for concurrent sessions	Program committee	October 1
2. Directional and Informational signs (buses, unloading area, hard to find rooms, etc.)	Steering committee for review	October 1
3. Exhibits (directional, coffee, door prizes, etc.)	Exhibits committee	September 15
4. Idea room	Idea room chairperson	October 1
5. Registration	Registration committee	September 15

*The issues of EduGram are usually a coordinated effort through the State Department of Education. A listing of all conferences on inservice day is given.

b. Photographer

There are three recommended criteria in selecting a person to do the conference photography:

- (1) an interest in photography
- (2) knowledge of what usually happens at the conference
- (3) willingness to be a roving delegate who will be able to capture much of what is going on during the two days

c. Exhibit directory

There are three essential components to make a useful directory:

- (1) vendor ads
- (2) map of exhibit area
- (3) alphabetical listing of vendors with locations in exhibit area

Ads are solicited from vendors in the first mailing. These are collected up until the point that the directory goes to graphics--six (6) weeks before the conference.

As with the program, printing should not be done until the last minute in order to catch as many last minute changes as possible.

3. News Coverage

News coverage is terribly important, but making contacts can be just a little overwhelming to the novice. Three avenues appear to be open to this person in making the contacts. These are listed in priority order:

a. Visit in person

This is the ideal. Set an appointment and take a copy of the handbill/tentative schedule and a synopsis of the conference offerings in case you are asked to make a recording while you are there. Synopsis should include the date and place of the conference, who might be interested in attending, conference highlights, name of the organization and its purpose. Be sure to emphasize the importance of the exhibit area to TV stations. Try to set up coverage at the beginning of the conference. Plan to make an initial contact with newspapers and TV stations about 4 weeks in advance. Two weeks to 10 days is adequate for radio.

b. Community relations

If there is a person who serves in this role and is accessible to the publicity chairperson, he/she should be approached for assistance. Public Service announcements are probably routine for them and such an announcement delivered to the media before a personal visit is recommended. This person may also be able to help in locating appropriate contacts at the newspaper, radio, and television offices.

c. Chamber of commerce

If the publicity chairperson is restricted by time, this may be a reasonable alternative. The Chamber of Commerce will indicate what information is needed and when.

4. Pitfalls

a. Role of publicity chairperson

The role of publicity chairperson should be one that will involve him/her in planning with all committees. This assures consistency in information sent out, avoids unnecessary overlap, and fills some communication gaps between committees.

b. Publicity committee

It is difficult to divide the kind of work, described above, among a committee. However, there are several jobs for which volunteers can be solicited, well in advance. They are: development of program document (mostly information gathering); photography and conference coverage; arrangements for interviews, press and TV coverage.

c. Responsibility for mailings

Having responsibility for all publications can present one avoidable problem for the publicity chairperson. Don't accept full responsibility for determining numbers of publications needed. Be sure to have the steering committee review the mailing lists and provide input on the numbers for publications needed to be printed.

d.

e.

5.

6.



E. SITE

1. Communication with Hotel and Other Facilities

a. Contract with facility

- (1) must be signed by OEMA president
- (2) should be completed no less than twelve months before conference
- (3) should provide all available space conceivably needed with provision for release when it is determined some space is not needed.
- (4) should include prices to be paid, although hotels are reluctant to confirm some prices one year in advance, especially for sleeping rooms
- (5) should name contact person with title and be signed by general manager
- (6) must be read carefully and understood by OEMA people responsible. Fine print surprises are no fun.

b. Contact person(s) at hotel

- (1) will probably be catering supervisor or sales representative, but you will also find yourself working with banquet coordinators, reservation managers, maintenance, and others.
- (2) Cultivate your prime contact. Keep in touch to let them know how you are progressing with conference plans. They appreciate well organized groups who know what they want and need. Monthly contact is recommended until six weeks before the conference, then weekly.
- (3) Make all requests through the prime contact. He must know what is happening but may refer you to others for clarification of details.
- (4) Early payment of part of hotel costs is usually appreciated. Involve or inform manager if early payment is made.
- (5) The assignment matrix is a chart with rooms across the top and times on the left. It is the forerunner of the written program. It is the Bible for the hotel. Before making up the matrix, get the acceptable format from the hotel. (This will save hours of translation later.) See the sample from the Valley River Inn ('79 conference)

(6)

(7)

c. Standards for room sizes

Estimates of minimum room sizes are based on educated guesses by former conference planners.

- (1) concurrent sessions theater style - 10 square feet per person
- (2) keynote session theater style - 7.5 square feet per person. Varies with size of room.
- (3) exhibits - 75 square feet per 4' x 8' table or 120 square feet per 8' x 10' booth
- (4) OEMA business meeting theater style - 7.5 square feet per person
- (5) film festival theater style - 7.5 square feet per person
- (6) banquet - banquet style - Head table plus entertainment - 10 square feet per person
- (7) no host social hour - 200 square feet per bar plus 5 square feet per person

(8)

(9)

d. Time needed by hotel staff to set up rooms between sessions

(1) meals - two hours

(2) furniture - one-half hour

(3) bedroom to session - two hours

(4)

(5)

e. Costs

(1) hotel may charge in various ways

(a) eating rooms - usually free with meal function

(b) sleeping rooms - special rate for certain number of conference registrants

(c) meeting rooms

(d) exhibit hall

(e) catering (coffee, etc.)

(f) parking

(g) electricity

(h) rooms in other buildings

(i)

(j)

(2) Miscellaneous

(a) in the metropolitan area, there may be no site committee. The responsibility may be divided between hospitality and administration.

(b) The hotel will want one contact. This should be the site chairman or other executive committee representative.

(c)

(d)

2. Pitfalls

a. Conference attendance will decrease in direct proportion to the distance from Portland.

b. Isolated facilities will discourage some, who feel conference hotel rates are too high, from attending.

c. An adequate lead time is needed for reserving space.

d. A decision on conference site should be made two years in advance for the city and 18 months in advance for specific site and facilities.

e.

f.

3.

4.

F. LOCAL HELP

Nicola Laird
1979
Eugene

1. Chamber of Commerce

Each Chamber of Commerce will have their own set of services to be rendered to organizations with a conference. The following are some possibilities to explore with them:

- a. Nametags
- b. Restaurant/motel listing
- c. "Things to do" brochure
- d. Contact with news media
- e. Typing of name tags for pre-registrants
- f. Help at registration table
- g.
- h.



2. Mayor

3. Public Library Human Resources File

4.

5.

G. HOSPITALITY

By Toni Martinazzi
1967
Portland

1. Meals

a. Menus

Choice of menus and arrangements is the sole responsibility of the hospitality committee and the general conference committee should not entangle itself with arguments between beef and veal lovers.

b.

c.

2. Banquet

a. Table decorations

b. Head table arrangements

(1) Decisions of who sits at the head table should be made jointly by conference chairperson and OEMA president.

(2) persons to consider

(a) speaker

(b) OEMA president

(c) keynoter

(d) incoming OEMA president

(e) conference chairperson

(f) master of ceremonies

(g) AECT or AASL V.I.P.



c. Refunds (discourage them)

Hotels want exact count 48 hours prior to banquet, but will probably allow 5-15% increase. You will be charged for any decrease.

d. Pay hotel for number of tickets they collect.

e.

f.

3. V.I.P.'s

As arrangements are made for interviews with any notable guests of the conference, notify their host to inform the guest.

a. Meeting V.I.P.'s

Be on hand when these people arrive and act as a liaison for person coming in from the news media.

b. Handy tip guide for handling V.I.P.'s

(1) After delivering V.I.P. to hotel room, allow 1½ hours of undisturbed nose-powder and jet lag adjustments.

(2) Help V.I.P. get registration packet.

(3) Insure conference treasurer gets V.I.P.'s honorarium and expense check to V.I.P. at agreed upon time.

(4) Tell V.I.P. if room is or is not prepaid or reimbursed.

(5) Conference and OEMA leaders should meet V.I.P.'s

(6)

(7)

4. Coffee

a. Gratis beverages have been provided

(1) at breaks

(2) in exhibit area during set up.

(3) in exhibit area during conference

(4) all of the above

(5)

(6)

b.

c.

5. Restrooms

These should be on hotel map.

6. Information Booth

a. One or persons during conference.

b. Telephones

c. "Ask me" buttons for all committee members

d.

e.

7. Hosts and Hostesses

Ribbons need to be ordered for each person serving as a host. A list of these people should be available from the Hospitality Committee. There should be a host or hostess at each session.

Responsibilities of the host or hostess:

a. Introduce speaker

b. Collect attendance data

c. Act as a time keeper

d. Cut off speaker at end of time, if necessary

e.

f.

8.

9.

H. CONFERENCE EVALUATION

By Dave Siegel
1976 and 1977
Portland



1. Objectives

You should have a clear grasp of:

- a. Objectives of current conference committee.
- b. Objectives of board
- c. Objectives of next year's conference committee.
- d. Objectives of the evaluation.
- e.
- f.

2. Evaluators

These groups may be asked to fill out evaluation forms:

- a. Attendees
- b. Exhibitors
- c. Conference committee
 - (1) Have debriefing meeting two weeks after conference.
 - (a) follow meeting with hosted social hour.
 - (b) Current conference chairperson should conduct meeting with next year's conference chairperson and this year's evaluator in attendance.
 - (c) A facilitator may be valuable depending upon the mood of the conference committee.
 - (d)
 - (e)
 - (2)
 - (3)
- d.
- e.

3.

4.